



Office for
the Aging

Health Insurance Information, Counseling and Assistance Program (HIICAP) Reporting

September 25, 2023

NYS HIICAP Data Snapshot

2022-2023 Program Year

- Total Client Contacts: 92562
- Group Outreach and Education events: 2781
- Media Outreach and Education events: 3065

NYS HIICAP Data Snapshot

As a program, we have trained over 744 counselors and dedicated over 157877 hours to SHIP counseling and SHIP related activities!

NY Medicare Data Snapshot

- There are a total of 3.8 million residents enrolled in Medicare in New York.
- In 2023, there are 288 Medicare Advantage Plans available in New York.
- Over 50% of NY Medicare beneficiaries are insured through a MAPD
- In 2023 there are 19 Prescription Drug Plans in NY.
- Approximately 475,00 Medicare beneficiaries are insured through supplemental plans.
- MSP Data: June 2023
 - QMB Only: 78,286
 - QMB and Full MA: 704,518
 - QI: 34,563

STARS Registration & Reporting

STARS Registration

- STARS Update 19-10: The NYS State HIICAP Team (Helen Fang and Heather Leddick) will continue to create new STARS Team Member Profiles within the SHIP Tracking and Reporting System (STARS) for your agency. Please do not create new Team Members yourself.
- In order to register new counselors and volunteers in the STARS system, you will need to send a completed team member profile form to our office via fax 518-486-2225 only.
- Once we receive the completed form, we will then create the new team member in STARS. New users will then receive a Welcome to STARS email with log in information from Booz Allen. Please check Spam folder for the email.

Note: For those who will be reporting through the Statewide Client Data System (Peer Place) we will also send the counselors e-file ID after they have been created as a new team member in STARS.



Office for
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New York - STARS User Roles

Stars Submitter - assigned to all HIICAP volunteers.

- Can create forms for their activities or the activities conducted by others
- Can access the standard search tool to view and update own forms and forms about their own efforts
- **Unable** to update data entered by others about others, view other team member profiles, delete any type of data, access reports.

Site Staff- assigned to all HIICAP & NY Connects Staff.

- Can create and search any activity forms for their site, update the activity forms they have created, search and view team member profiles and data for their site (i.e., read only)
- **Unable** to generate resource report or performance measure report or delete any type of data

Site Manager- assigned to all HIICAP & NY Connects Coordinators.

- Can enter, edit, and search all types of data at the site level and access all reports at the site level.
- **Unable** to delete data
or create team member profiles per NYSOFA guidance.

Confidentiality Form for SHIP Unique ID

- Per the Administration on Community Living (ACL), all Health Insurance Information Counseling and Assistance Program (HIICAP) counselors must update their SHIP Unique Counseling ID Confidentiality Form on an annual basis.
- NYSOFA implemented the annual renewal process on July 1, 2021. Program Instructions are issued annually to review and update the Confidentiality agreement and return to NYSOFA HIICAP.
- This instruction will be required on an annual basis. Annual privacy review and training will also be required.

Data Reporting

Health Insurance Information, Counseling and Assistance Program (HIICAP), referred to on a federal level as State Health Insurance Assistance Program (SHIP), and the Medicare Improvements for Patients and Provider Act (MIPPA) data can be reported one of two ways:

- Directly into the federal web-based SHIP Tracking and Reporting System (STARS).

Or

- Through the Statewide Client Data System that utilizes an Application Programming Interface (API) model to schedule and automatically upload data from the proprietary system (PeerPlace) to STARS. The submission dates vary month to month due to scheduling coordination with Booz Allen and PeerPlace.

STARS Reporting Considerations

- For those entering data directly into the Federal STARS reporting system, please follow the Administration for Community Living (ACL) reporting requirements. For those entering data in the Statewide Client Data System HIICAP Workflow Path (Peer Place), NYSOFA emails reporting deadlines on a monthly basis. These API Submission dates differ from the STARS reporting deadlines.

Date Monthly Effort occurred	Data Entry Due Dates for Efforts
April	May 31
May	June 30
June	July 31
July	August 31
August	September 30
September	October 31
October	November 30
November	December 31
December	January 31
January	February 28
February	March 31
March	April 30

New York Statewide Client Data System Reporting Considerations

For those reporting through the **New York Statewide Client Data System** that utilizes an API model to schedule and automatically upload data from the proprietary system to STARS.

Can be Sent via API:

- Beneficiary Contact form
- Group Outreach & Education form
- Media Outreach & Education form

Cannot be Sent via API:

- Additional Sessions form
- Additional Presenters
- Team Member form (created by NYSOFA only)
- Activity forms
- Attachments to forms - Part D Enrollment Outcomes (PDEO)
- Update forms
- Delete forms

All data that currently cannot be sent through the API submission should be entered directly in STARS.

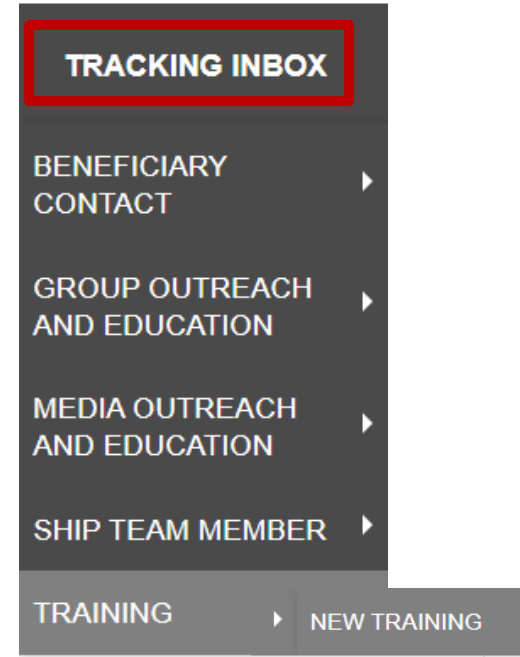
STARS Enhancements

Training form

Goal: To collect data related to trainings team members participate in to support their knowledge base for both the SHIP and MIPPA programs.

New Training Form!

- Captures orientation, training, and testing time for both SHIP and MIPPA.
- Completed by SHIP Site Managers (NY Connects, HIICAP coordinator).
- “View only” access Site Staff (NY Connects, HIICAP, AAA staff).
- No access for STARS Submitter roles (volunteers).
- Time spent = length of training x number of attendees



Training Topics

- Coordination of Benefits
- Dual Demonstration
- Employer Health Benefits
- Long-term Care Insurance
- Marketing Regulations
- Medicaid
- Medicare Advantage (MA-MA-PD)
- Medicare Part D
- Medicare Plan Finder
- Medicare Savings Programs
- Medigap or Medicare Select
- Original Medicare (Part A & B)
- Other Health Insurance
- Other Prescription Assistance

- Part D Low Income Subsidy (LIS/ Extra Help)
- Preventive Services
- Veterans Health Benefits

Administrative Topics

- CMS Unique ID
- Confidentiality
- Complaints Tracking Module
- Customer Service/Counseling Skills
- Forms & Reporting
- MARx
- Performance Measures
- Presentation Skills
- Program Information
- Program Management
- Outreach

Training Providers

- ACL
- CMS
- Medicaid Agency
- MIPPA Resource Center (NCBOE)
- Social Security Administration
- SHIP TA Center
- SMP Resource Center
- SHIP/SMP/ MIPPA State/ Local SHIP Created/ Developed
- Other ACL Resource Center
- Other National Partner
- Other Federal Government Partner

What can be entered on the Training Form

Orientation, formalized training, and testing that informs stakeholders how the SHIP and MIPPA network acquire the skills, knowledge and training to provide Medicare beneficiaries with accurate and person-centered enrollment information

- All training venues are accepted -
- Training can be provided in-person or virtually
- Can be for a group at a single point in time (live classroom training or webinar)
- Can be self-paced individual learning, compiled on a monthly basis with all participating SHIP and MIPPA program staff (recorded webinars and the annual HHCAP exam)

Data Entry impact

Won't this increase our data entry load?

- **Training Form:**

- Data entry time: **2 ½ min.**
- Number of people: **1**
- **Total data entry time: 1 person x 2 ½ min. = 2 ½ minutes**

- **Activity Form:**

- Data entry time: **1 min.**
- Number of people: **500**
- Total data entry time: **500 people x 1 min. = 500 minutes (8.33 hours)**

Total credit on resource report = **240,000 minutes (4,000 hours)**

Training Form data populates the resource report

	Hours by Training Delivery Method			
	SHIP-Only	SHIP & MIPPA	MIPPA-Only	Total
In Person	1.00	7.00	0.00	8.00
Online-Self Paced	4.00	0.00	0.00	4.00
Virtual/Online	1.00	3.00	2.00	6.00
In Person & Virtual/Online	0.00	2.00	0.00	2.00
Other	0.00	1.00	0.00	1.00
Total	6.00	13.00	2.00	21.00

	Hours by Training Type			
	SHIP-Only	SHIP & MIPPA	MIPPA-Only	Total
Orientation	0.00	0.00	2.00	2.00
Initial	0.00	8.00	0.00	8.00
Update	6.00	5.00	0.00	11.00
Total	6.00	13.00	2.00	21.00

120-Day Inactivity & 90-Day Password Change

Beginning June 2023, ACL fully implemented the 120-day inactivity rules. These rules affect the ability to log in, team member status, and/or CMS Unique ID status. Also, be aware that STARS has a 90-day password change policy and STARS prompts users to change their passwords as they attempt to logon. Multiple attempts to log into STARS will cause the STARS to lock that account.

Locked accounts and direct entry users:

- If the 120 Days of Inactivity rules are met, the team member's account becomes inactive and locked, preventing STARS log in. Affected team members should contact both NYSOFA HIICAP and the Booz Allen STARS help desk in the same email, as Booz Allen will need to confirm active status of individual counselor with NYSOFA HIICAP before acting on the request for STARS log-in assistance. NYSOFA will be responsible for updating Team member status in STARS.

Locked accounts and the API feed:

- Locked accounts do not impede the API data transfer. Data will still send to STARS, even if accounts are locked. However, sending counseling data after the CMS SHIP Unique ID has been revoked, does not reinstate the CMS SHIP Unique ID. Coordinators will need make a request to NYSOFA HIICAP to reinstate the CMS SHIP Unique ID. The decision to reinstate the CMS UID is made on an individual case by case basis

120-Day Inactivity Rules

Inactivity and the Team Member Form Status field:

- These fields are about a team member's status with the program (active, inactive, or retired). If a team member with an active status does not log in and does not have program work entered in STARS for 120 days, the Status field on their team member form will be automatically set to inactive.

Inactivity and the CMS Unique ID:

- The CMS Unique ID status depends upon counseling activity, as shown on the Beneficiary Contact form. The CMS Unique ID will become automatically inactive if a team member has not reported any beneficiary contacts or additional sessions within 120 days.
- Once the Unique IDs have lapsed, SHIP directors can manually update unique IDs on an individual counselor, case by case

Paid Status: Team Member Form

- Text options for Paid Status are expanded:
 - SHIP-Paid
 - SHIP In-Kind-Paid
 - SHIP Volunteer
 - MIPPA-Paid
 - MIPPA In-Kind-Paid
 - MIPPA Volunteer
- Existing users have had their current Paid Status options updated

New rules - Paid Status

Please include SHIP/MIPPA Program for each team member. Example: if the individual is a SHIP volunteer you would choose SHIP Volunteer and MIPPA volunteer. This ensures all data entered populates to both SHIP and MIPPA performance measures.

- **Volunteer :**
 - Volunteer status **cannot** be combined with any Paid or In-Kind-Paid status
 - Volunteer status options **can only** be combined with another volunteer status.
 - For example, someone **can be both** a SHIP and MIPPA volunteer. However, they **cannot be** a volunteer for one program and paid or in-kind for another.
- **In-Kind-Paid + Paid:**
 - Someone's paid status **can** be In-Kind-Paid for one program and Paid for another program.

Form Updates

- **New fields** have been added for all forms:
 - Session Entered By
 - Date of Last Update
- For beneficiary contacts, group outreach, and media outreach, location fields have been reordered: zip code, state, and then county.
- For all parent* object forms, a **green** confirmation message now displays after a form has been successfully submitted:
 - *Example - BCF is the parent object and BAS is the child object.

 **Record Successfully Saved**

Form Updates – Beneficiary Contacts

- A new field has been added: **“Have you or a family member ever served in the military?”**
- The State of Beneficiary Residence and State of Session Location fields now auto-populate based on the corresponding zip code fields.
- “Receiving or Applying for Social Security Disability or Medicare Disability” defaults to “No” if the Beneficiary Age Group is over 65.

Form Updates – Beneficiary Contacts

- The Time Spent fields have been limited to a maximum total of 2400 minutes.
 - This is a generous amount of time, to allow for complex case work.
 - Most contacts are much shorter than 2400 minutes.
- “Employer” has been added as an additional option for the “How Did Beneficiary Learn About SHIP?” field.

Form Updates Group and Media Outreach

- “**Substance Misuse/Fraud** has been added as an option for Topics Discussed in the Group and Media Outreach Forms.
- Some definitions in the updated Chapter 5 were enhanced for emphasis:
 - Materials distributed at events is media outreach. Don't use to count # of group outreach attendees
 - “Email” as a type of Media: only for email blasts, not for emails to individuals
 - “Other” as a Type of Media: sending mass pre-open enrollment forms, materials to walk-ins, materials at fairs

Topics Discussed Beneficiary Contacts

- The Topics Discussed options have been updated for the Beneficiary Contact Form and Beneficiary Additional Session Form in response to SHIP feedback.
 - Many new fields have been added, and some others have been retired.
 - For a full list of the new and retired Topics Discussed options, see Chapter 4 of the STARS manual.

Topics Discussed Beneficiary Contacts, cont.

- A selection of new **Topics Discussed** options for beneficiary contacts:
 - Equitable Relief
 - Medicaid; MSP Application Submission; Application Assistance
 - Medicaid; MSP Recertification
 - Supplemental Benefits
 - Chronic Conditions; Dual Eligible; Institutional Special Needs Plans
 - COVID-19
 - Substance Misuse/Fraud

Report Updates: Performance Measures Reports

- **Both:** Updated population data (i.e., “denominator” data) through each program’s 2021 grant year
- **SHIP Performance Measure 5** (enrollment discussed) has been updated to include new qualifying Topics Discussed
- **MIPPA Performance Measure 4** (applications submitted) has been updated to include new qualifying Topics Discussed

For additional information, see the updated [SHIP and MIPPA Performance Measures At-A-Glance Reference](#) documents.

Report Updates: Resource Report

- The Resource Report has been redesigned and expanded to include MIPPA data and data from the new Training Form. Time spent is reported by Program, Paid Status, and user role, and form type.

	SHIP-Only Personnel by Paid Status				SHIP & MIPPA Personnel by Paid Status						MIPPA-Only Personnel by Paid Status				Total
	SHIP-Paid	SHIP Volunteer	SHIP In-Kind	Total	SHIP-Paid & MIPPA-Paid	SHIP Volunteer & MIPPA Volunteer	SHIP In-Kind & MIPPA In-Kind	SHIP-Paid & MIPPA In-Kind	MIPPA-Paid & SHIP In-Kind	Total	MIPPA-Paid	MIPPA Volunteer	MIPPA In-Kind	Total	
SHIP Director	0	0	0	0	3	0	0	0	0	3	0	0	0	0	3
Assistant Director	0	0	0	0	1	0	0	0	0	1	2	0	0	2	3
SHIP State Staff	2	0	0	2	1	0	0	0	0	1	0	0	0	0	3
Sub-state Manager	0	0	1	1	0	0	0	0	0	0	0	0	2	2	3
Sub-state Staff	0	1	2	3	0	0	0	0	0	0	0	0	0	0	3
Site Manager	0	0	0	0	2	0	0	0	0	2	1	0	0	1	3
Site Staff	1	2	0	3	0	0	0	0	0	0	0	0	0	0	3
Team Member	0	0	0	0	0	1	0	0	0	1	0	2	0	2	3
STARS Submitter	0	2	0	2	0	1	0	0	0	1	0	0	0	0	3
Total	3	5	3	11	7	2	0	0	0	9	3	2	2	7	27

Report Updates - Summary & Data Export Reports

- All existing STARS Summary and Data Export Reports have been updated to account for changes to forms (including new Topics Discussed options).
 - A Training Form Summary Report will be added in a future STARS enhancement.

Part D Enrollment Outcomes (PDEO)

PDEO

How to Report Prescription Drug Enrollment Outcomes (PDEO) for PDP/MA-PD:

1. Collect Plan Cost Information
2. Assist Beneficiary with Enrollment
3. Enter Data in STARS
4. Attach Verification

Step 1: Collect Part D/MA-PD Cost

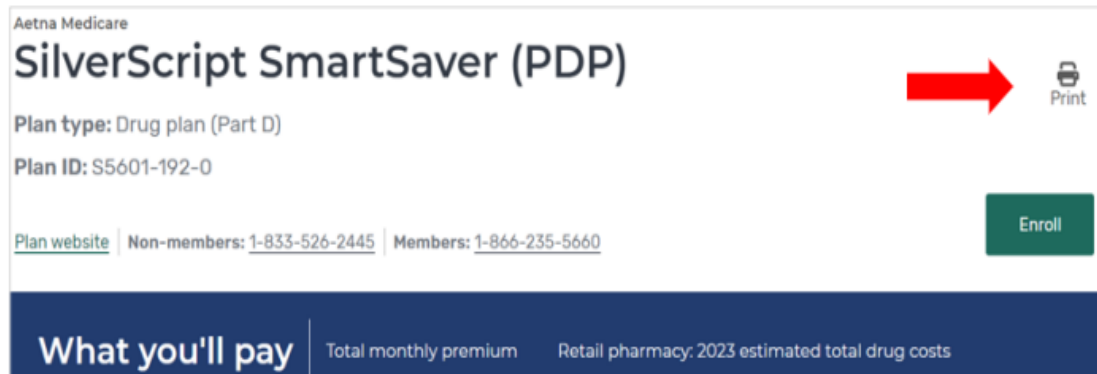
In most cases, cost comparison data will come from the Medicare Plan Finder (MPF). Starting October 1, 2022, if you are using the MPF for enrollment, all verification documentation for plan costs must include the MPF Plan Details page. You can collect data on both:

- Switching from one PDP/MA-PD to another
- New to Medicare PDP/MA-PD

In both cases the first step is to gather the plan cost information from the MPF. You should save and upload the Plan Details page of the beneficiary's original plan (if applicable) and new plan to demonstrate the Original and New PDP/MA-PD costs.

Step 1: Collect Part D/MA-PD Cost

- At the top of each page of the Plan Finder, there is an option to print the page. You can use this to save the Plan Details page as a PDF.



Aetna Medicare
SilverScript SmartSaver (PDP)
Plan type: Drug plan (Part D)
Plan ID: S5601-192-0

[Plan website](#) | Non-members: [1-833-526-2445](#) | Members: [1-866-235-5660](#)

[Enroll](#)

What you'll pay | Total monthly premium | Retail pharmacy: 2023 estimated total drug costs

Step 2: Assist Beneficiary with Enrollment

After you assist with enrolling the beneficiary in the new plan, save the Medicare Plan Finder (MPF) Enrollment Request Received page and attach it to the Beneficiary Contact Form (BCF) or Beneficiary Additional Session (BAS).

A PDF of the MPF Enrollment Request Received page can be used as enrollment verification documentation.

Step 2: Assist Beneficiary with Enrollment

A PDF of the MPF Enrollment Request Received page can be used as enrollment verification documentation.

Medicare.gov

You're all set. Your application is with the plan.

For 2021, you're joining: Clear Spring Health Premier Rx (PDP)

Plan ID: S6946-055-0
Plan includes: Only drug coverage

Name of person joining plan: [REDACTED]

Confirmation number for your application: 0ab61df6d4d5
Keep this number. You'll need it if you contact the plan before your coverage starts.

The plan will review and process your application. The plan may contact you if it needs more information to see if you're eligible to join.

[Print Your Application](#)

Contact the plan directly if you have any questions.

Clear Spring Health Premier Rx (PDP)
P.O. BOX 4016
Scranton, PA 18505

Phone: 1-877-317-6082
Website: <http://www.clearspringhealthcare.com>

Step 3: Enter Enrollment Data in STARS

Topics Discussed: Check the Enrollment topic in either the “Medicare Advantage (MA and MA-PD)” or “Medicare Part D” sub-category to report enrollment assistance, not both.

Medicare Advantage (MA and MA-PD)

- ☐ Appeals/Grievances
- ☐ Benefit Explanation
- ☐ Chronic Conditions Special Needs Plans
- ☐ Claims/Billing
- ☐ Disenrollment
- ☐ Dual Eligible Special Needs Plans
- ☐ Eligibility/Screening
- ☐ Enrollment

Medicare Part D

- ☐ Appeals/Grievances
- ☐ Benefit Explanation
- ☐ Claims/Billing
- ☐ Disenrollment
- ☐ Eligibility/Screening
- ☐ Enrollment
- ☐ Fraud and Abuse

Only One

Step 3: Enter Enrollment Data in STARS

If the beneficiary is new to PDP/MA-PD, like example select the New to Medicare topic in the “Additional Topic Details” group. (You must scroll to find this topic.)

Additional Topic Details

☐ Medicare Card

☐ Medicare.gov Account

☐ Mental Health

☒ New to Medicare

☐ Opioids

☐ Physical Therapy

☐ Preventive Benefits

☐ Skilled Nursing Facility

Step 3: Enter Enrollment Data in STARS

Enter cost data from the Plan Details page of the MPF in the Special Use Fields (SUFs) toward the bottom of the BCF or BAS. (Dollar values from previous examples in this chapter appear below.)

Ex. 1.1 (Switching Plans):

Special Use Fields

Original PDP/MA-PD Cost 4331.76

New PDP/MA-PD Cost 636.40

Ex. 1.2 (New to Medicare):

Special Use Fields

Original PDP/MA-PD Cost 150

New PDP/MA-PD Cost 224.40

Valid character verification errors STARS Special Use Fields (SUFs) for PDEO tracking only accept the following types of characters: dollar signs, commas, numbers, and decimal points. You are also limited to two decimal places.

Step 4: Attach Verification

To verify the PDP/MA-PD cost data reported on the BCF or BAS, you must attach the MPF Plan Detail pages showing the costs as they appear on the MPF and enrollment verification page for the new plan from MPF. Each BCF or BAS in STARS has the capacity to accept five attachments, and they are located toward the bottom of the form.

Attach File	<input type="text"/>	<input type="button" value="Browse"/>
Attach File	<input type="text"/>	<input type="button" value="Browse"/>

Step 4: Attach Verification

When verifying cost changes for someone changing plans, you must upload three attachments:

1. MPF Plan Details for the original plan
2. MPF Plan Details for the new plan
3. Enrollment verification for the new plan

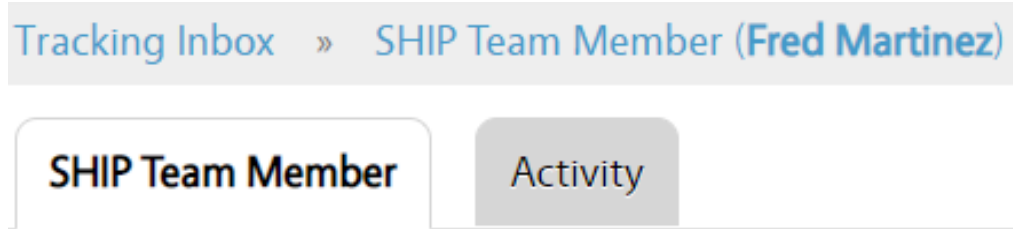
When verifying cost changes for someone new to Medicare, you must upload two attachments:

1. MPF Plan Detail pages for the plan they selected
2. Enrollment verification for the plan

Activity Form

Activity Form

The **Activity tab** is associated with each saved team member profile in STARS. This is how you access the Activity Form in STARS.



The **Activity Form** is used to report Team member activity hours in minutes that have not already been reported on the Beneficiary Contact, Group Outreach and Education Contact, and Media Outreach and Education Contact forms. Time spent should be entered at minimum on a monthly basis, to maintain accurate account of time devoted to the SHIP/MIPPA program.

This is also important for program support staff /volunteers and program leaders in order to remain active in STARS.

Activity Form

Program Management/Team member Management

- Providing staff and volunteer recruitment, retention, and supervision;
- Overseeing, preparing, and analyzing data reports;
- Scheduling meeting and trainings; and
- Providing travel reimbursements to volunteers, etc.

Administrative Support

- Providing data entry, copying, filing, mailing; and
- Other paid or in-kind agency staff who help to manage day to day operations such as receptionists, accountants managing grant dollars, and Executive Directors managing overall agency functions, etc.

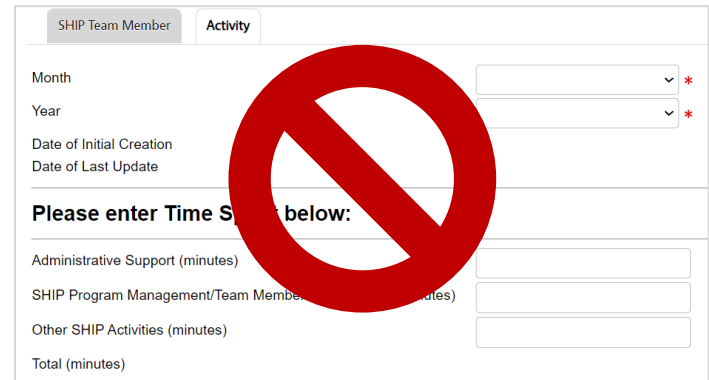
Other SHIP Activities

- Mentoring volunteers;
- Brochure distribution;
- SHIP or MIPPA marketing, informational, and educational materials that are publicized, disseminated and distributed to partner organizations and other local community sites, includes travel to deliver the information, etc.;
- Team member's travel to outreach and training events

Change to the Activity Form Guidance

Beginning June 2023, training, testing, and orientation time is entered by SHIP Site Managers (HIICAP/NY Connects Coordinators) using the new Training Form.

Do not enter training, testing, or orientation time in the “Other” field of the Activity Form.



The screenshot shows the 'Activity' tab of a form. It includes fields for 'Month', 'Year', 'Date of Initial Creation', and 'Date of Last Update'. Below these is a section titled 'Please enter Time Spent below:' with four input fields: 'Administrative Support (minutes)', 'SHIP Program Management/Team Member (minutes)', 'Other SHIP Activities (minutes)', and 'Total (minutes)'. A large red prohibition sign is overlaid on the form, indicating that training, testing, or orientation time should not be entered in the 'Other' field.

MIPPA

MIPPA Performance Measures

**PM1: Overall MIPPA
Contacts**

Percentage of total beneficiary contact forms per Medicare beneficiaries under 150% FPL in the State

**PM2: Overall Persons
Reached through
Outreach**

Total number of people reached as reported on group outreach and education forms

**PM3: MIPPA Target
Populations**

Total number of beneficiary contact forms by target beneficiary groups (Under 65, Rural, Native American, English as a Secondary Language)

**PM4: Contacts with
Applications
Submitted**

Percentage of forms with applications submitted compared to overall MIPPA contacts reported in PM1

MIPPA Data Fields

Important reminder for those who utilize the HICAP Workflow Path of the Statewide Client Data System. If the “MIPPA yes” field is checked for a beneficiary contact (Units Entry), please also select the appropriate MIPPA qualifying topic. This is necessary so all MIPPA beneficiary contacts (units' entry in PP) process and meet STARS validation upon API submission.

MIPPA Qualifying Topics Discussed		
Part D Low Income Subsidy (LIS/Extra Help)	Medicaid	Additional Topic Details
Application Assistance Application Submission Benefit Explanation Eligibility/Screening LI NET/BAE	Benefit Explanation Eligibility/Screening Medicaid Application Assistance Medicaid Application Submission* Medicaid Recertification* Medicare Buy-In Coordination MSP Application Assistance MSP Application Submission* MSP Recertification*	Preventive Services

MIPPA Elements

- **Group Outreach Forms** that have one item in each of the following areas checked will count:

Target Beneficiary Group:

- Low Income or
- Rural (rural counties should also check off Low Income to ensure **accurate** MIPPA count)



Topics:

- Extra Help/LIS,
- Medicaid,
- MSP, or
- Preventive Services

SHIP Performance Measures

SHIP Performance Measures Reports

Can be generated directly by STARS users with the Site Manager role (HIICAP & NY Connects Coordinators)

- Can be run for any time period
- The system will limit time frame to one year or less
- Reports will not be distributed quarterly
- Instead, users generate reports as needed, including ACL

Performance Measure Report – PM1

PM1: Client Contacts

**Percentage of total client contacts per
Medicare beneficiaries in the state.**

STARS data used – PM 1 Client Contacts:

All Beneficiary Contact Forms and SHIP Beneficiary Additional Sessions forms that have at least one discussion topic selected

Performance Measure Report – PM2

PM2: Outreach Contacts

Percentage of persons reached through presentations, booths/exhibits, and enrollment events per Medicare beneficiaries in the State.

STARS data used – PM 2 Outreach Contacts:

Number of Attendees reported on the group Outreach and Education form

Note: 1) Estimated number of people reached in Media Outreach and Education forms does not count 2) Count only direct interactions with attendees, not estimated number of conference attendees

Performance Measure Report – PM3

PM3: Medicare Beneficiaries Under 65

Percentage of contacts with Medicare beneficiaries under the age of 65 per Medicare beneficiaries under 65 in the State.

STARS data used – PM 3 Medicare Beneficiaries Under 65:

All Beneficiary Contact Forms and SHIP Additional Beneficiary Session forms with both "Receiving or applying for Social Security Disability or Medicare disability" and "64 or younger" selected.

Performance Measure Report – PM4

PM4: Hard-to-Reach Contacts

Percentage of low-income, rural, and non-native English contacts per total “hard-to-reach” Medicare beneficiaries in the State.

STARS data used – PM4: Hard-to-Reach Contacts:

All Beneficiary Contact Forms and Beneficiary Additional Sessions forms with at least one hard-to-reach demographic population as follows:

Low income: “Beneficiary Monthly Income” = Below 150% FPL

Non-native English speaker: “English as a Primary Language” = No

Rural: County needs to meet ACL/ CMS/ CDC rural classification



Performance Measure Report – PM5

PM5: Enrollment Contacts

Percentage of unduplicated enrollment contacts (i.e., contacts with one or more qualifying enrollment topics) discussed per Medicare beneficiaries in the State.

STARS data used – PM5 Enrollment Contacts:

Beneficiary Contact Forms and SHIP Beneficiary Additional Sessions forms with at least **one** enrollment topic selected under the Topics Discussed. ACL allows the selection of either MAPD or Part D enrollment, as selecting both will cause submission errors. A list of Qualified Enrollment Topics for PM# 5 can be found at

<https://portal.shiptacenter.org/Handler.ashx?ItemType=File&ItemGuld=138cdf98-bdf4-42ff-8b99-9dcb08942ee2> .

Accessing the Performance Measures Report

Step 1

HOME TRACKING INBOX SEARCH REPORTING ADMINISTRATION **CONFIGURATION**

Configuration » Pages » Shared Pages »

PAGES SHARED PAGES DASHBOARD OPTIONS

Shared Pages Dashboard Options

Step 2

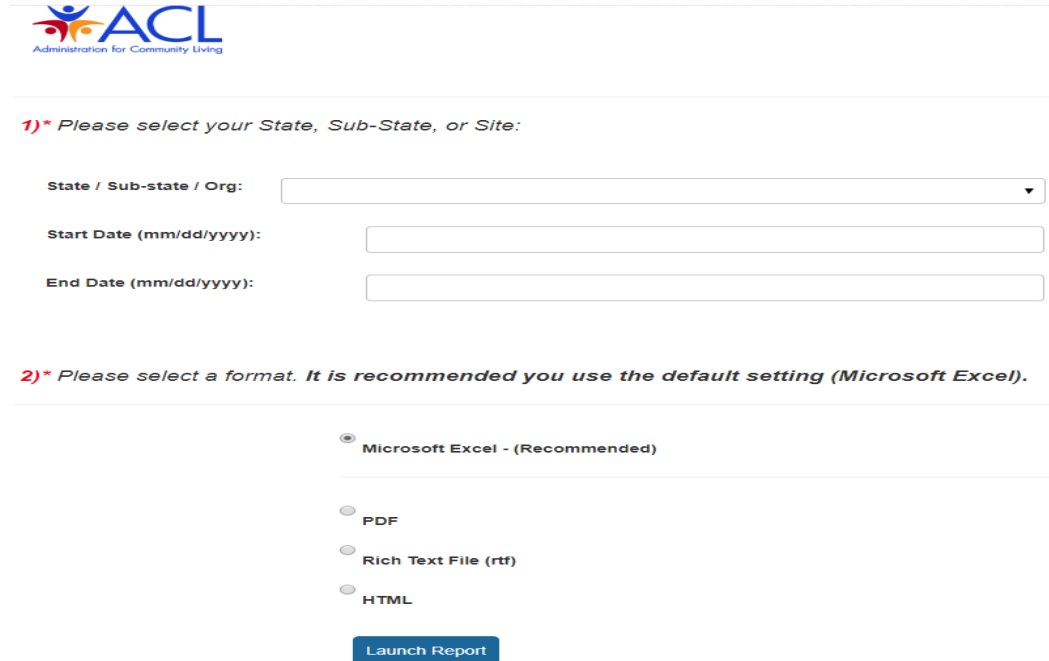
Name	Description	Business Key
▶ 1-800 Medicare Unique ID's Report - State	This launch page launches the 1-800 Medicare Unique ID's Report for State user in STARS.	report.1800MedicareUniqueID'sStateReport
▶ Performance Measure Report - State and User	This launch page launches the State and User PM Reports.	report.PerformanceMeasureReportStateUser
▶ Resource Report - User	This launch page launches the User Resource Report for State, Sub-state, and Site users in STARS.	report.UserResourceReport

Step 3

Note: You can follow the same steps outlined here to access the MIPPA performance measure report.

To Run a Performance Measure Report

1. Choose your site then date range
2. Choose format (excel is the default)
3. Click Launch



The screenshot shows the ACL Administration for Community Living interface. At the top is the ACL logo. Below it, a red instruction reads: "1)* Please select your State, Sub-State, or Site:". There are three input fields: "State / Sub-state / Org:" (a dropdown menu), "Start Date (mm/dd/yyyy):", and "End Date (mm/dd/yyyy):". Below these fields, another red instruction reads: "2)* Please select a format. It is recommended you use the default setting (Microsoft Excel).". There are four radio button options: "Microsoft Excel - (Recommended)", "PDF", "Rich Text File (rtf)", and "HTML". The "Microsoft Excel" option is selected. At the bottom is a blue button labeled "Launch Report".

[illegible]

Resource Report

About the Resource Report

The Resource Report is used to gather metrics on the various demographics of users in the STARS system. The local program resource report provides a summary of active users (demographics such as age, years in the program and second language) and the number of hours spent on activities during a date range (usually 1 program year).

- A team member is deemed active if they have time entered on the Activity form or if they conducted a counseling or outreach session during the report date range. Team member who has not been deactivated with an end date may still be listed as a team member on your agency's resource report.
- Training time currently pulls from "Other SHIP Activities" on Activity Form, but a new Training Form is under development.

Sources of Data for the Resource Report

Forms:

- Beneficiary Contact Form: *Date, Time Spent* and *Session Conducted By*
- Group Outreach and Education Form: *Date, Time Spent* and *Session Conducted By*
- Media Outreach and Education Form: *Date, Time Spent* and *Session Conducted By*
- Activity Form (attached to Team Member Form): *Month, Year, Total Minutes*

Data Displayed but not used as a filter: Paid Status, Role, Demographics

Accessing the Resource Report

Step 1

HOME TRACKING INBOX SEARCH REPORTING ADMINISTRATION **CONFIGURATION**

Configuration » Pages » Shared Pages »


PAGES SHARED PAGES DASHBOARD OPTIONS

Shared Pages Dashboard Options

Step 2

Name	Description	Business Key
▶ 1-800 Medicare Unique ID's Report - State	This launch page launches the 1-800 Medicare Unique ID's Report for State user in STARS.	report.1800MedicareUniqueIdsStateReport
▶ Performance Measure Report - State and User	This launch page launches the State and User PM Reports.	report.PerformanceMeasureReportStateUser
▶ Resource Report - User	This launch page launches the User Resource Report for State, Sub-state, and Site users in STARS.	report.UserResourceReport

Step 3

 **NEW YORK**
STATE OF
OPPORTUNITY.

**Office for
the Aging**

To Run a Resource Report

1)* Please select your State, Sub-State, or Site:

State Hierarchy:

Click the arrow to see your hierarchy and make a selection

Start Date (mm/dd/yyyy):

Enter your date range

End Date (mm/dd/yyyy):

2)* Please select a format. *It is recommended you use the default setting (Adobe PDF).*

☒ PDF - (Recommended)

PDF recommended but not required

☐ Microsoft Excel

☐ Rich Text File (rtf)

☐ HTML

Launch Report

Sample Resource Report

	SHIP-Only Personnel by Paid Status				SHIP & MIPPA Personnel by Paid Status						SHIP Total
	SHIP-Paid	SHIP Volunteer	SHIP In-Kind	Total	SHIP-Paid & MIPPA-Paid	SHIP Volunteer & MIPPA Volunteer	SHIP In-Kind & MIPPA In-Kind	SHIP-Paid & MIPPA In-Kind	MIPPA-Paid & SHIP In-Kind	Total	
SHIP Director	0	0	0	0	1	0	0	0	0	1	1
Assistant Director	0	0	0	0	1	0	0	0	0	1	1
SHIP State Staff	0	0	0	0	2	0	0	0	0	2	2
Sub-state Manager	0	0	0	0	0	0	0	0	0	0	0
Sub-state Staff	0	0	0	0	0	0	0	0	0	0	0
Site Manager	0	0	1	1	67	2	27	0	0	96	97
Site Staff	0	0	0	0	104	2	148	0	1	255	255
Team Member	0	0	0	0	1	1	2	0	0	4	4
STARS Submitter	0	0	0	0	10	164	4	0	0	178	178
Total	0	0	1	1	186	169	181	0	1	537	538

	Hours by Training Delivery Method		
	SHIP-Only	SHIP & MIPPA	SHIP-Total
In Person	3.00	24.17	27.17
Online-Self Paced	0.00	20.50	20.50
Virtual/Online	10.00	46.33	56.33
In Person & Virtual/Online	0.00	8.00	8.00
Other	3.00	1.25	4.25
Total	16.00	100.25	116.25

	Hours by Training Type		
	SHIP-Only	SHIP & MIPPA	SHIP-Total
Orientation	3.00	5.00	8.00
Initial	2.00	30.50	32.50
Update	11.00	64.75	75.75
Total	16.00	100.25	116.25

STARS Technical Assistance

For questions related to STARS, contact Helen Fang or Heather Leddick

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